Core HBA performance: drug, mass merchants

Top shampoos

(Drug stores, total U.S.)

Rank	Category—regular shampoo	Unit sales
1.	Alberto VO5 shampoo extra/body 15 ounce	517,432
2.	Pert shampoo and conditioner In One	446,833
3.	Alberto VO5 shampoo regular normal 15 ounce	440,660
4.	White Rain shampoo extra body 15 ounce	366,315
5.	Alberto VO5 shampoo regular 15 ounce	321,170
6.	Neutrogena shampoo regular 6 ounce	301,869
7.	Pert+ shampoo conditioner normal 2 ounce	298,769
8.	Neutrogena gel dandruff shampoo 4.4 ounce	290,905
9.	Suave shampoo extra/body Balsam & Protein 16 ounce	276,871
10.	Suave shampoo extra/body Moisturizing 16 ounce	276,484
11.	Suave shampoo regular normal dry 16 ounce	270,508
12.	White Rain shampoo regular 15 ounce	265,003
13.	Head and Shoulders dandruff shampoo 15 ounce	263,158
14.	Salon Selective shampoo regular 2 ounce	257,300
15.	Suave shampoo regular normal Strawberry 16 ounce	249,878

Source: Information Resources Inc., InfoScan for 1st quarter ended March 29, 1992.

Top shampoos/conditioners

(Mass merchants, total U.S.)

Rank	Category	Unit sales
1.	White Rain shampoo extra body 15 ounce	945,329
2.	White Rain shampoo regular 15 ounce	650,900
3.	White Rain shampoo apple pectin 15 ounce	609,067
4.	White Rain shampoo/conditioner extra body 11 ounce	523,923
5.	Alberto VO5 shampoo extra body 15 ounce	514,925
6.	Style shampoo regular normal apple 15 ounce	459,505
7.	Pert shampoo and conditioner in one regular	435,464
8.	Suave shampoo nourishing 16 ounce	432,573
9.	Style II shampoo moisturizing dry 15 ounce	396,157
10.	White Rain shampoo and conditioner 11 ounce	391,210
11.	Head and Shoulders dandruff shampoo 15 ounce	379,287
12.	Alberto VO5 shampoo regular 15 ounce	372,103
13.	Style III shampoo body 15 ounce	363,531
14.	Suave shampoo regular normal strawberry 16 ounce	345,135
15.	Alberto VO5 shampoo JoJoba 15 ounce	345,107

Source: Information Resources, Inc. InfoScan for 1st quarter ended March 29, 1992.

Top hair conditioners

(Drug stores, total U.S.)

Rank	Category	Unit sales
1.	Suave Hair conditioner moisturizing	324,504
2.	Alberto VO5 hair conditioner Extra Body 2 ounce	333,442
3.	Aussie 3M hair conditioner .75 ounce	332,417
4.	Suave hair conditioner extra body 16 ounce	280,841
5.	Alberto VO5 hair drs. regular normal oil 1.5 ounce	268,761
6.	St. Ives Swiss Formula 1 ounce	259,067
7.	Finesse hair conditioner extra body 2 ounce	242,896
8.	Alberto hair conditioner 15 ounce	220,944
9.	White Rain hair conditioner extra body 15 ounce	218,357
10.	Suave hair conditioner nurishing vitamin 16 ounce	211,744
11.	Salon Selective hair conditioner moisturizer 15 ounce	209,942
12.	Alberto VO5 hot oil treatment moisturizer 1 ounce	204,367
13.	Rave hair conditioner regular permed 18 ounce	187,051
14.	Salon Selective hair conditioner 15 ounce	185,084
15.	Alberto VO5 hair dressing blue gray 1.5 ounce	177,324

Source: Information Resources Inc. InfoScan for 1st quarter ended March 29, 1992.

Top hair conditioners

(Mass merchants, total U.S.)

Rank	Category	Unit sales
1.	White Rain hair conditioner extra body 15 ounce	628,908
2.	White Rain hair conditioner Apricot and Apple 15 ounce	427,827
3.	Suave hair conditioner nurishing vitamin 15 ounce	390,890
4.	White Rain hair conditioner regular 15 ounce	358,962
5.	Style I repair 16 ounce	357,197
6.	Alberto VO5 hair conditioner extra body 15 ounce	341,619
7.	Suave hair conditioner moisturizing dry 16 ounce	341,530
8.	Style hair condtioner normal fine 15 ounce	338,495
9.	Suave hair conditioner moisturizing dry 16 ounce	318,435
10.	Alberto VO5 hair conditioner repair Jojoba 15 ounce	298,593
11.	Alberto VO5 hair conditioner detangling repair 15 ounce	282,291
12.	Suave hair conditioning extra body repair 16 ounce	279,728
13.	No More Tangles hair rinse 12 ounce	273,378
14.	Rave hair conditioner regular permed 18 ounce	269,087
15.	Style I repair 16 ounce	258,138

Source: Information Resources, Inc. InfoScan for 1st quarter ended March 29, 1992.

Top hand and body lotions

(Drug stores, total U.S.)

Rank	Category	Unit sales (in millions)
1.	Vaseline Intensive Care lotion regular 10 ounce	670,435
2.	Lubriderm 1 ounce	609,118
3.	Vaseline regular 20% free	568,514
4.	Jergens lotion tube Aloe & Lanolin scented 1 ounce	514,749
5.	Ntnwf cream w/lip moisturizer regular 2 ounce	444,336
6.	Vaseline Intensive Care lotion Aloe & Lanolin reg. 12 ounce	415,610
7.	Vaseline Intensive Care lotion Aloe & Lanolin Herb. 20% free	377,360
8.	Vaseline lotion regular 10 ounce	337,642
9.	Ntnwf cream 2 ounce	311,247
10.	Vaseline Intensive Carelotion 20% free 18 ounce	300,763
11.	Jergens lotion regular 33% free 20 ounce	276,926
12.	Lubriderm lotion pump 16 ounce	265,887
13.	Vaseline Intensive Care lotion 12 ounce	247,308
14.	Jergens lotion Aloe & Lanolin regular 33% 20 ounce	223,952
15.	Lubriderm lotion plastic bottle pump scented 16 ounce	223,099

Source: Information Resources Inc. InfoScan for 1st quarter ended March 29, 1992.

Top hand and body lotions

(Merchants, total U.S.)

Rank	Category	Unit sales
1.	Vaseline Intensive Care lotion 10 ounce	716,711
2.	Vaseline Intensive Care lotion 10 ounce	520,149
3.	Vaseline Intensive Care Aloe & Lanolin 12 ounce	474,608
4.	Vaseline Intensive Care pump 20% free 18 ounce	405,407
5.	Lubriderm lotion 1 ounce	374,739
6.	Vaseline Intensive Care lotion 12 ounce	331,014
7.	Suave lotion Aloe Vera 15 ounce	280,992
8.	Jergens Dry lotion 10 ounce	267,392
9.	Jergens Dry lotion pump 33% free 20 ounce	246,127
10.	Jergens lotion plastic bottle 10 ounce	237,424
11.	Lubriderm lotion pump scented 16 ounce	224,198
12.	Ponds cream jar 6.5 ounce	220,644
13.	Suave lotion pump vitamin E and lanolin 15 ounce	219,590
14.	Melrose cream lanolin 4 ounce	208,467
15.	Vaseline Intensive Care Aloe & Lanolin 20% free 18 ounce	199,660

Source: Information Resources, Inc. InfoScan for 1st quarter ended March 29, 1992.

Core HBA performance: drug, mass merchants

Top shaving creams/gels

(Drug stores, total U.S.)

Rank	Category	Unit sales
1.	Edge Aloe Vera sensitive 7 ounce	682,119
2.	Foamy regular	583,120
3.	Barbasol regular 11 ounce	516,549
4.	Edge regular 7 ounce	390,831
5.	Edge conditioning Lanolin regular	375,930
6.	Barbasol sensitive 11 ounce	367,713
7.	Barbasol Lanolin 11 ounce	338,134
8.	Gillette Foamy sensitive reg. 11 ounce	330,011
9.	Colgate regular 11 ounce	321,460
10.	Colgate Aloe Vera regular 11 ounce	301,195
11.	Gillette Foamy Lemon-Lime 11 ounce	277,793
12.	Edge regular 7 ounce	275,133
13.	Colgate sensitive regular 11 ounce	259,482
14.	Barbasol Aloe regular 11 ounce	246,895
15.	Softs Moisturizer regular 7 ounce	242,214

Source: Information Resources Inc. InfoScan for 1st quarter ended March 29, 1992.

Top shaving creams/gels

(Mass merchants, total U.S.)

Rank	Category	Unit sales
1.	Edge Aloe Vera sensitive 7 ounce	648,595
2.	Colgate regular 11 ounce	613,334
3.	Colgate Aloe Vera regular 11 ounce	582,888
4.	Colgate sensitive regular 11 ounce	500,140
5.	Barbasol regular 11 ounce	464,021
6.	Edge conditioning Lanolin regular 7 ounce	411,793
7.	Edge regular 7 ounce	386,597
8.	Barbasol sensitive 11 ounce	362,689
9.	Barbasol lanolin 11 ounce	341,205
10.	Gillette Foamy 33% free	312,354
11.	Gillette Foamy sensitive regular 11 ounce	272,178
12.	Colgate Lime 11 ounce	270,328
13.	Edge regular 7 ounce	252,224
14.	Softs moisturizer vitamin lanolin 7 ounce	234,593
15.	Colgate lanolin 11 ounce	196,644

Source: Information Resources, Inc. InfoScan for 1st quarter ended March 29, 1992.

Top dentrifice

(Drug stores, total U.S.)

Rank	Category	Unit sales
1.	Pepsodent adult regular paste 6.4 ounce	1,047,000
2.	Crest adult regular mint gel 0.85 ounce	984,215
3.	Crest adult tartar control original paste 6.4 ounce	979,315
4.	Crest adult tartar control fresh mint gel 6.4 ounce	835,546
5.	Close Up regular toothpaste 8.2 ounce	683,334
6.	Colgate regular 7 ounce	677,291
7.	Crest adult regular paste 6.4 ounce	658,925
8.	Crest adult regular paste 0.85 ounce	653,061
9.	Crest adult tartar control regular paste 8.2 ounce	638,791
10.	Arm & Hammer Baking Soda regular paste .9 ounce	634,046
11.	Crest adult tartar control mint gel 8.2 ounce	590,789
12.	Crest adult tartar regular paste 4.6 ounce	575,927
13.	Close Up regular toothpaste 6.4 ounce	565,547
14.	Aqua Fresh adult regular paste 1.4 ounce	560,661
15.	Arm & Hammer green regular fresh gel .9 ounce	536,174
16.	Colgate regular paste tube in box 4.6 ounce	530,182
17.	Crest adult regular mint paste 6.4 ounce	509,451
18.	Colgate Tartar control regular paste 6.4 ounce	490,492
19.	Arm & Hammer dental care mint paste box 5 ounce	473,801
20.	Arm & Hammer dental care adult regular paste 4.5 ounce	471,499

Source: Information Resources, Inc. InfoScan for 1st quarter ended March 29, 1992.

Top dentrifice

(Mass merchants, total U.S.)

Rank	Category	Unit sales
1.	Crest adult tartar control original 6.4 ounce	2,308,000
2.	Crest adult tartar control fresh mint gel 6.4 ounce	2,146,000
3.	Crest adult regular paste 6.4 ounce	1,596,000
4.	Crest adult tartar control regular taste 8.2 ounce	916,015
5.	Crest adult tartar control mint gel 8.2 ounce	881,719
6.	Close Up regular toothpaste 6.4 ounce	869,112
7.	Crest adult regular mint paste 6.4 ounce	820,531
8.	Crest adult regular gel 6.4 ounce	810,932
9.	Colgate regular paste 7 ounce	652,297
10.	Pepsodent adult regular paste 6.4 ounce	648,338
11.	Aqua Fresh adult regular paste 6.4 ounce	595,488
12.	Crest adult regular mint gel 0.85 ounce	535,106
13.	Colgate adult white regular paste 9 ounce	505,264
14.	Close Up regular tartar control 6.4 ounce	500,287
15.	Crest adult regular paste 8.2 ounce	480,039
16.	Arm & Hammer dental care mint paste 5 ounce	474,183
17.	Aqua Fresh adult regular paste 1.4 ounce	460,496
18.	Arm & Hammer adult regular paste 4.5 ounce	441,748
19.	Crest adult regular paste 0.85 ounce	414,658
20.	Colgate adult white tartar control regular 8.1 ounce	402,270

Source: Information Resources, Inc. InfoScan for 1st quarter ended March 29, 1992.

Top oral antiseptics

(Drug stores, total U.S.)

Rank	Category	Unit sales
1.	Listerine Antiseptic 32 ounce	1,423,000
2.	Listerine Antiseptic 18 ounce	728,662
3.	Listerine Antiseptic regular gold 48 ounce	649,326
4.	Listerine Antiseptic 12 ounce	631,336
5.	Listerine Antiseptic 6 ounce	579,032
6.	Listerine Antiseptic 3 ounce	478,885
7.	Scope Mint green 1ct 40 ounce	458,409
8.	Plax antiseptic plaque mint 24 24 ounce	452,475
9.	Scope Peppermint blue 1.5 ounce	426,208
10.	Plax mint green 16 ounce	420,012
11.	Signal green 32 ounce	359,598
12.	Scope mint green 24 ounce	358,168
13.	Scope mint green 6 ounce	352,244
14.	Plax antiseptic plaque original red 24 ounce	334,022
15.	Plax antiseptic plaque original red 16 ounce	328,957

Source: Information Resource Inc. InfoScan for 1st quarter ended March 29, 1992.

Top oral antiseptics

(Mass merchants, total U.S.)

Rank	Category	Unit sales
1.	Listerine antiseptic 32 ounce	2,509,000
2.	Listerine antiseptic 48 ounce gold	675,828
3.	Scope mint 32 ounce green	492,144
4.	Scope mint 40 ounce green	488,477
5.	Listerine antiseptic 12 ounce	482,630
6.	Plax antiseptic plaque 16 ounce red	434,180
7.	Scope mint 1.5 ounce	414,339
8.	Plax antiseptic plaque 16 ounce red	403,396
9.	Scope mint 24 ounce green	329,005
10.	Scope mint 12 ounce green	313,335
11.	Plax antiseptic mint 24 ounce	301,497
12.	Nobrand peppermint 24 ounce	289,785
13.	Plax antiseptic original 24 ounce	255,192
14.	Listerine antiseptic 6 ounce	238,499
15.	Scope peppermint 1.5 ounce blue	202,745

Source: Information Resources, Inc. InfoScan for 1st quarter ended March 29, 1992.

Hair styling, shampoos hold universal appeal

In this issue, we focus on Part 2 of the 1992 survey: men's and women's buying habits when shopping for shampoos, hair styling and hair coloring products.

The emergence of two-in-one shampoo-conditioner products—largely driven by young consumers and males—is a prominent trend explained by the study's findings. And buyers point to this segment as a business builder, not a cannibalizer, which is a major plus in the hotly competitive toiletries business.

The drug store edge in selling toiletries is convenience, as borne out by the survey. Findings explore the varied appeals of different store formats.

Part 1 of the Gallup survey focused on skin, bath and sun care, and appeared in the June 22 issue of *Drug Store News*.

GALLUP '92

Drug stores are stronger on convenience than price

Most frequently used hair care products								
				Among consumers in these age groups				
	Total	All men	All women	18-24	25-34	35-49	50-64	65 Plus
Shampoo and conditioner	38%	20%	54%	51%	46%	38%	30%	25%
Shampoo only	37	55	20	21	34	40	40	44
2-in-1 shampoo with conditioner	20	19	21	27	19	21	23	10
Bar soap/or wash at beauty salon	5	6	5	0	0	1	6	21
Some combination of the above	95	94	95	99	99	99	93	79

Source: *Drug Store News*/Gallup 1992 Consumer Survey.

Drug stores should be very careful how they price their styling products, stay in line with competition. . . and stress the convenience of shopping their stores.

The majority of drug store shoppers, 59 percent, said they were buying hair styling products in a drug store because it was "convenient" for them to do so.

How to alter purchase routines

If one compares the findings from Gallup's 1990 Beauty Care Survey to this year's survey, it is apparent that female hair styling product users are not shopping regular drug stores as frequently as they once were.

In 1990, Gallup discovered that 16 percent of women said they bought their hair styling products "most often" in a regular drug store. This year, only 12 percent gave that answer.

More women said they were shopping for hair styling products in deep discount drug stores, up seven points to 25 percent who gave this answer in 1992 versus 1990.

And more women were buying hair styling products in beauty salons, food stores, beauty supply shops, specialty stores and department stores.

Price and broad selection are clearly factors that favor shopping in deep discount stores and beauty supply shops while the convenience of one-stop-shopping helps the food stores.

The prestige of carrying the upscale brands like Nexxus and Paul Mitchell, of course, helps the beauty salons and department and specialty stores.

To combat this trend, regular chain drug stores should be very careful how they price their styling products, stay in line with competition, stay abreast of hot new launches, create an exciting merchandising presentation and do all they can to stress the convenience of shopping their stores.

More women said they were shopping for hair styling products in deep discount drug stores, up seven points to 25 percent who gave this answer in 1992 versus 1990.

Forty-four percent of all style product users said the reason they shopped the stores they did was because it was "convenient" to their homes or offices. Thirty-six percent said it was because they offered the lowest prices in town. Fourteen percent said it was because this store offered their favorite brand exclusively or they had the best selection.

Drug stores rank high in convenience

In reporting to Gallup the reasons they shopped regular drug stores, only 23 percent of hair product styling users who were drug store customers said they shopped there because they were able to get the lowest prices.

The majority of drug store shoppers, 59 percent, said they were buying hair styling products in a drug store because it was "convenient" for them to do so.

However the customers of food stores were even more likely to cite "convenience" as the reason for their purchase.

Eight-six percent of users who bought styling products in a food store said it was because it was convenient to do so.

But food stores were at a disadvantage when it came to price and so were drug stores.

Only 11 percent of users who bought hair styling products in a food store said it was because of low prices, and only 23 percent of drug store hair styling customers have this answer.

The price advantage clearly lies with the deep discount drug chains and the discount department stores.

Sixty-five percent of users buying hair styling products in a deep discount drug store said it was because of price, and 69 percent of discount store customers also gave this answer.

Discount stores also had an advantage in terms of how their shoppers rated them in brand selection.

So it seems as if drug stores have to

work a little harder to offer their customers, as well as potential target customers, even more convenience as well as sharper prices and a stronger merchandising presentation.

More women, men seek shampoos with conditioners

Almost all Americans wash their hair with shampoo rather than bar soaps or other cleansing products. And half of all Americans condition their hair after shampooing.

This, of course, makes shampoos a high tonnage category, but in this year's Consumer Buying Habits Study, the Gallup Organization found that usage does slacken off as consumers get older.

A small number of consumers, especially women as they get older, tend to delegate the shampooing of their hair to their beauticians. It's easier and it conveys a sense of being pampered.

Six percent of consumers 50 to 64 and 21 percent of those 65 and older told Gallup they either had their hair washed in a beauty salon or they washed it themselves with a bar of soap.

But this anomaly aside, the vast majority of Americans do clean their hair with shampoos, and both women and men are starting to favor shampoos with conditioning ingredients in the same formula.

Shifts in shampoo brand preferences

	All men 1990	All men 1992	All women 1990	All women 1992
Suave	5%	7%	5%	9%
Pert Plus	5	12	5	6
Nexxus	2	2	7	6
Finesse	1	2	3	5
Flex	3	3	1	4
Salon Selectives	1	1	2	4
Prell	6	5	4	3
Vidal Sassoon	2	2	2	3
White Rain	2	2	3	3
Paul Mitchell	1	2	2	3
Head & Shoulders	13	16	4	2
Redken	1	1	3	2
Ivory	2	2	4	2
Perma Soft	1	1	3	2
Neutrogena	1	1	1	2
Alberto VO5	2	2	1	1

Base: Those who use shampoo to wash their hair.
Source: *Drug Store News*/Gallup 1992 and 1990 Consumer Survey.

Young consumers experiment with 2-in-1 shampoo brands

Not surprisingly, given the success and the popularity of two-in-one products—Pert Plus, the brand that created the two-in-one category, was one of the most popular brands in the shampoo segment. It was actually twice as popular with convenience-minded men as with women.

Twelve percent of all men who shampooed named Pert Plus as their favorite shampoo compared with just 6 percent of the women.

Pert Plus also scored very highly with young users: 15 percent of users 18 to 24 named Pert Plus as their favorite compared to 6 percent of users 50 and older.

Younger consumers, of course, are more likely to experiment with newer products and newer formulas. Older consumers, on the other hand, tend to stick with their traditional favorite brands.

Favorite brand of shampoo

	Total	All men	All women	Among consumers in these age groups: 18-24	25-34	35-49	50-64	65 Plus
Pert Plus	9%	12%	6%	15%	11%	8%	6%	7%
Head & Shoulders	9	16	2	8	9	7	9	11
Suave	8	7	9	9	6	11	6	9
Nexxus	4	2	6	7	5	4	3	1
Prell	4	5	3	2	3	2	8	6
Finesse	4	2	5	2	4	5	2	5
Flex	3	3	4	2	4	4	3	2
Salon Selectives	3	1	4	10	2	1	3	1
Vidal Sassoon	3	2	3	3	3	2	2	4
White Rain	2	2	3	5	2	2	4	0
Paul Mitchell	2	2	3	3	3	4	1	1
Alberto VO5	2	2	1	3	1	1	2	1
Redken	2	1	2	3	2	2	1	1
Ivory	2	2	2	0	2	3	1	2
Perma Soft	2	1	2	0	2	1	2	4
Neutrogena	2	1	2	2	1	2	1	0

Base: those who use shampoo to wash their hair
Source: *Drug Store News*/Gallup 1992 Consumer Survey.

Booming 2-in-1 segment is toddler in hair care category

In this year's survey, Gallup found that the two-in-one shampoo/conditioner segment that emerged a few years ago is booming.

Twenty-one percent of the women and 19 percent of the men in this year's Gallup survey said they "most frequently use" a two-in-one shampoo/conditioner to clean their hair.

The incidence of frequent use was highest with consumers 18 to 24 (27 percent said they used a two-in-one product) and lowest among consumers 65 and older (just 10 percent used a two-in-oner).

But this is very good penetration for a category that has only started to grow through new product introductions in the past two years. Until then, Pert Plus was the only two-in-one product on the market. Its popularity literally created this category.

Many hair care buyers also believe that two-in-one products have expanded rather than cannibalized sales in the shampoo/conditioner market, and the Gallup findings bear this out.

Fifty-four percent of women in the survey told Gallup they use a shampoo and a separate conditioner. Buyers think that women who like to experiment with different types of products on their hair also tend to use separate shampoos and conditioners at home and take along two-in-one products when traveling or at the gym.

Men, as women have come to learn, are a different breed. They like things simple. For 55 percent of the men in this survey, that meant using a shampoo only. Just two out of every 10 men (20 percent) said they "most frequently" shampooed their hair and then applied a conditioner; 6 percent said they washed with a bar soap or had their hair washed in a salon.

Many hair care buyers also believe that two-in-one products have expanded rather than cannibalized sales in the shampoo/conditioner market, and the Gallup findings bear this out.

Women fickle, men loyal when choosing shampoo

Women buy shampoos very much like they buy fragrances. They experiment. They especially like to try new brands and they often mix Brand A shampoo with Brand B conditioner and Brand C hair spray.

Men also buy shampoos like they buy fragrances. But unlike women, they pick a favorite brand and stick with it.

The popularity of Head & Shoulders clearly illustrates this trend. Two percent of the women surveyed named it as their favorite brand. But it was named as the favorite brand by a whopping 16 percent of the men.

There were only four brands in this year's survey to have at least a 5 percent share of popularity with women.

Sixty-one percent of consumers named a mass brand of shampoo as their favorite compared to 9 percent who named a salon brand.

Favorite brand of hair color

	Total	Women
Clairol brands	41%	44%
L'Oréal brands	20	23
Revlon/Revlon Roux	6	6

Base: Consumers who bought hair color in the past six months.

Source: *Drug Store News*/Gallup 1992 Consumer Survey.

Women are the prime users of hair color

Percent who purchase	Total	Men	Women	Among consumers in these age groups: 18-24	25-34	35-49	50-64	65 Plus
	13%	4%	21%	7%	9%	13%	21%	14%

Source: *Drug Store News*/Gallup 1992 Consumer Survey.

Suave was the favorite of women with a 9 percent popularity share; Pert Plus and Nexxus tied with a 6 percent share; and Finesse made it into the running with a 5 percent share.

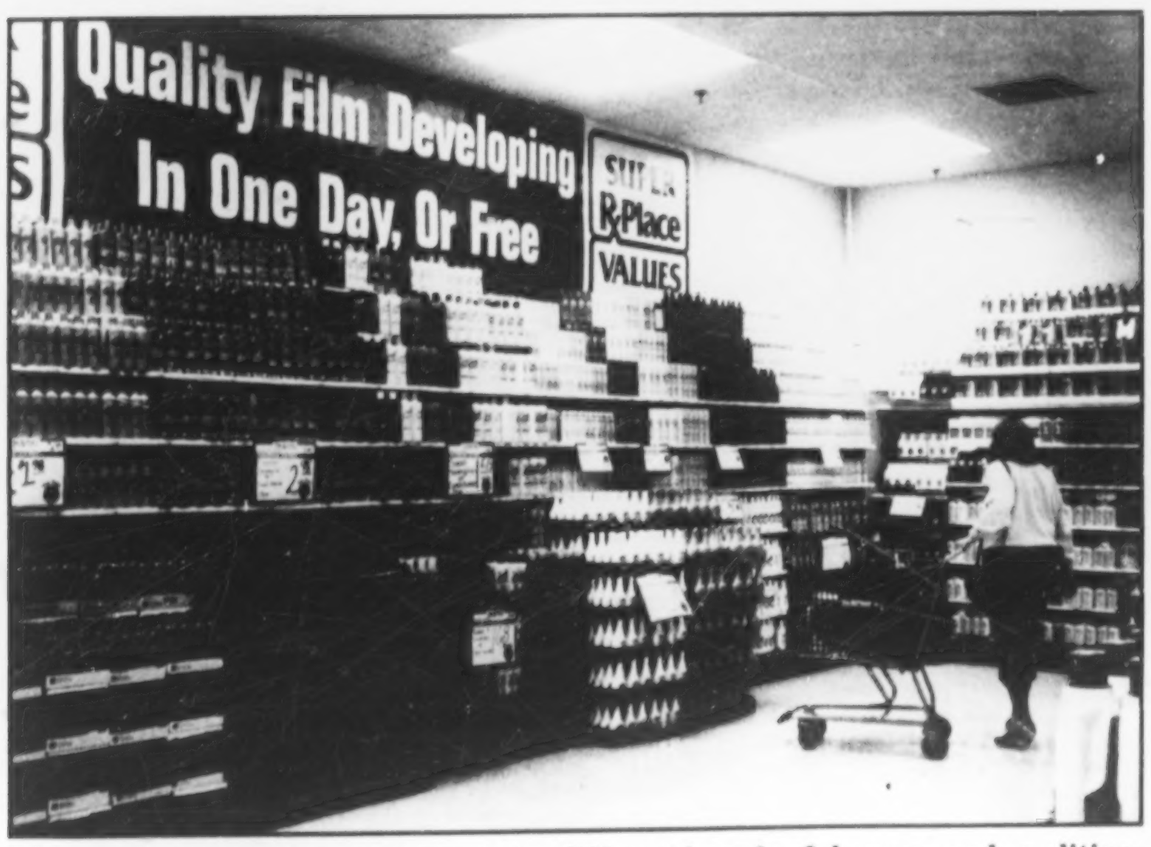
Gallup compared the brand preferences of men and women in this year's survey with the preferences noted in our 1990 Purchase Habits Survey, and we can see some interesting shifts in their buying habits.

Because of some formula and packaging changes, Flex's popularity with women was softening in the 1990 study. But this year, Flex, with a new "back to basics" campaign supporting it, has rebounded and now has a 4 percent popularity share instead of the 1 percent share it had in 1990.

Back in 1990, 5 percent of male respondents singled out Pert Plus as their favorite brand. But this year, possibly because men were particularly impressed by the high ratings Consumer Reports gave to Pert Plus in one of its issues, 12 percent of the male respondents named Pert Plus as their favorite.

Helene Curtis' Suave, which has been steadily supported with strong advertising and consumer promotions, gained four points with women to hit a peak 9 percent popularity rating this year, and Finesse, another well-supported Curtis brand, also picked up two points to reach a 5 percent share this year.

It's interesting to note that three of the eight most popular brands were from Procter & Gamble and three were from Helene Curtis.



Women like to experiment, often mixing different brands of shampoo and conditioner, while men will find a brand they like and stick to it.

Most consumers name a mass market shampoo brand as their favorite

Type of brand	Percent who use it as a favorite
Mass market	61%
Salon	9
Door-to-door	1

Base: those who used a shampoo in the past four weeks.
29% didn't know or refused to answer.

Source: *Drug Store News*/Gallup 1992 Consumer Survey.

Styling product use gains 7 percent over last year

The hair styling category is not as high in penetration as shampoos, but it is still a respectable size category.

Fifty nine percent of all consumers, men and women, use some type of styling aid. As one might expect, usage rates are higher among women than men: 80 percent of all women use a hair styling product compared to 36 percent of men.

Back in 1990 when Gallup asked women whether they used hair styling products, just 73 percent said yes, so the penetration of the category is growing.

It's also a fact that younger shoppers use styling products more liberally than the older counterparts.

Half of all consumers 65 and older and 47 percent of consumers 50 to 64 said they never used styling products compared to just 24 percent of consumers 18 to 24 who gave this answer.

It's still true that the most popular styling product is hair spray, among both men and women: 18 percent of men and 66 percent of women said they used a hair spray in the past four weeks. The heaviest users of hair spray, 47 percent, were people under 35 and the lowest users, 39 percent, were in the 65 and older bracket.

Among men, gels have really grown in popularity over the years. Sixteen percent of all men said they used a gel. Hair care buyers also report that the men they know or they themselves use gels and sprays more than other styling products, and they say it is because gels and sprays are lighter and slicker, and just make men feel more comfortable using them.

However 8 percent of the men in the survey said they had used a mousse in the past week, and they may be borrowing a dab or two from their wives and girlfriends to experiment with.

Women tend to use a greater variety of styling products, everything from gels through curl energizers, volumizers, frizz managers, shine enhancers, and more.

Many buyers believe that women need to use different products to create effects to suit different occasions: 22 percent of the women in the survey said they used gels, and 20 percent said they used a mousse.

Sixteen percent of the women surveyed had used a spritz compared to just 4 percent of the men who said they used spritzes.

Four percent of the women used curl energizers compared to less than 1 percent of men; 4 percent of women used volumizers for extra body; and 1 percent had used an anti-frizz to control fly away or frizzy hair. Men's use of these types of styling products was minimal.

The most popular styling product among men and women is hair spray.

Most consumers name a mass market styling brand as their favorite

Type of brand	Percent who use it as a favorite
Mass market	52%
Salon	13
Door-to-door	0

Base: those who used a hair styler in the past four weeks

Source: *Drug Store News*/Gallup 1992 Consumer Survey.

Salon brands win, mass brands place in styling race

When it comes to styling products, mass market brands have some tough competition for the best known salon brands, but so far virtually no competition from door-to-door brands.

Gallup found that 52 percent of styling product users named a mass brand as their favorite while 13 percent named a salon brand. No one named a door-to-door brand as their favorite.

Paul Mitchell, a salon brand, was the dominant favorite, as popular with men as with women. Seven percent of the men and 6 percent of the women said Paul Mitchell was their favorite styling brand.

As one might expect, Paul Mitchell's popularity was a little less secure with older consumers: just 3 percent of hair styling product users over 64 named Mitchell as their favorite. The two brands with the strongest popularity in this age group were Final Net and Suave, both with a 7 percent popularity ranking.

Salon Selectives had a very high ranking with consumers 18 to 24: 12 percent of product users in this age segment named Salon Selectives as their favorite styling aid.

Alberto VO5 had a following with consumers in the 50 to 64 year old age bracket: 11 percent of users this age said Alberto VO5 was the brand they used "most often."

Hair care buyers often single out both Salon Selectives and VO5 as top sellers in the styling segment. Salon Selectives has been a winner partly because of its excellent product formulations, but also because its advertising in print and TV reaches a large following of younger users, and Alberto VO5 has the strength of tradition behind it as well as careful niche advertising support.

80 percent of women use a hair styling product

Category	All consumers 1990	All consumers 1992	All men 1990	All men 1992	All women 1990	All women 1992
Hair styling products	53%	59%	33%	36%	73%	80%

Source: *Drug Store News*/Gallup 1992 and 1990 Consumer Survey.

Changes in brand preferences for hair styling products

	All women 1990	All women 1992	All men 1990	All men 1992
Hair spray	60%	66%	19%	18%
Gel	21	22	9	16
Mousse	28	20	9	8
Spritz	14	16	NA	4
Curl energizer	4	4	NA	1
Volumizer	2	4	NA	*
Anti-frizz	NA	1	NA	1

* equals 0.4 percent

Source: *Drug Store News*/Gallup 1992 and 1990 Consumer Survey.

Favorite brand of hair styling product

	Total	All Men	All Women	Among consumers in these age groups: 18-24	25-34	35-49	50-64	65 Plus
Paul Mitchell	6%	7%	6%	5%	7%	9%	5%	3%
Suave	4	3	5	2	5	5	4	7
Salon Selectives	4	1	5	12	3	3	3	1
White Rain	4	2	5	0	6	4	6	1
Rave	4	1	5	3	4	5	2	5
Nexxus	4	4	4	1	7	4	3	0
Alberto VO5	4	3	4	2	1	3	11	4
Clairol	4	4	5	2	6	6	3	2
Vidal Sassoon	3	2	3	3	5	1	2	5
Finesse	3	0	4	2	3	5	1	1
Redken	2	3	2	3	3	3	1	0
Aussie	2	2	2	6	3	2	0	0
Aqua Net	2	*	3	0	2	2	4	3
Final Net	2	1	3	0	2	1	2	7

* equals 0.4%

Base: those who use hair styling products in the past four weeks.

Source: *Drug Store News*/Gallup 1992 Consumer Survey.

Most frequently used hair styling products

	Total	All Men	All Women	Among consumers in these age groups: 18-24	25-34	35-49	50-64	65 Plus
Hair spray	43%	18%	66%	46%	48%	41%	44%	39%
Gel	19	16	22	30	23	19	14	10
Mousse	14	8	20	15	17	14	14	11
Spritz	10	4	16	17	12	11	9	2
Curl energizers	3	1	4	3	3	3	4	0
Volumizers	2	*	4	3	3	3	2	0
Anti-frizz	1	1	1	1	1	1	2	*

* equals 0.4%

Source: *Drug Store News*/Gallup 1992 Consumer Survey

Where consumers buy hair styling products

Most drug store chains have expanded their styling assortments to take advantage of the dynamic growth this category has seen over the past several years.

That strategy's paid off in the sense that 37 percent of hair style product users say they buy their products "most often" in a drug store.

But food stores and mass merchandise stores have also been expanding their product assortment aggressively, and often advertising styling products at special discounted prices, and that too has paid off.

Twenty-one percent of the consumers in this year's Gallup Beauty Care Buying Habits Survey said they bought their styling products "most often" in a food store while 13 percent said they bought them most often in a discount store or beauty salon respectively.

Considering the growing popularity of beauty and barber supply stores, or over-the-counter beauty supply stores as they are also known, a surprising small number of users, just 7 percent, said they bought their hair styling products in these outlets.

It's possible that as drug stores and mass merchandisers built up their professional hair care sets, as has been the trend the past several years, they managed to steal share away from this especially tenacious competitor.

Many ethnic hair care buyers for drug chains say that they face increasingly tough competition for ethnic hair care sales from the B & B stores. Gallup discovered in this survey that non-white hair styling product users were twice as likely to buy their styling products in B & B stores than white shoppers (14 percent versus 6 percent respectively).

Gallup also found that users over 50 tended to buy their styling products in drug stores more often than anywhere else. Sixty-two percent of all users who were over 65, for example, bought their styling products "most often" in drug stores; 43 percent of users between 50 and 64 also shopped drug stores for styling products more often than anywhere else.

However, younger consumers buy the most styling products. Gallup discovered that 35 percent of users 18 to 24 were buying hair styling products in food stores. In comparison, only 29 percent of users this age were buying "most often" in drug stores, which could be a sign that drug stores are not doing enough to attract and court this important beauty care user market.

Why store-loyal consumers shop particular type of store for hair styling products

Reasons why customers of these stores shop here	*All users	discount drug store	regular drug store	food store	discount store
Convenient to home/office	44%	29%	59%	86%	20%
Lowest prices	36	65	23	11	69
Only store with favorite brand	8	2	7	2	2
Best selection	6	5	—	2	15
Habit	3	1	8	—	5
Cosmetician helps by recommending products	2	—	—	—	—
Salon products are superior to mass	2	—	1	—	—
Service is nice	1	—	—	—	—

* equals percent of consumers who said this was the reason they shopped a store

Base: consumers who used hair styling products in the past four weeks.

Source: *Drug Store News*/Gallup 1992 Consumer Survey.

Changes in where women "most often" buy hair styling products

Trade class	All women 1990	All women 1992
Deep discount drug stores	18%	25%
Regular drug stores	16	12
Total all drug stores	35	37
Food stores	16	17
Beauty salon	12	14
Discount stores	25	14
Beauty supply stores	4	8
Department stores	3	4
Specialty cosmetic stores	2	3
Door to door	NA	1

Data for male users is not available from the 1990 study.

Base: Those who used hair styling products in the past four weeks.

Source: *Drug Store News*/Gallup 1992 and 1990 Consumer Survey.

Why consumers shop a favorite store for hair styling products

Reasons to shop	All users	All men	All women	Among consumers in these age groups: 18-24	25-34	35-49	50-64	65 Plus
Convenient to home/office	44%	48%	43%	45%	42%	42%	54%	39%
Lowest prices	36	35	37	40	35	36	34	37
Only store with favorite brand	8	5	9	10	7	9	9	5
Best selection	6	1	8	4	7	7	4	7
Habit	3	3	3	1	2	3	1	6
Cosmetician helps by recommending products	2	3	2	1	4	3	1	1
Salon products are superior to mass	2	1	3	1	2	4	3	1
Service is nice	1	1	1	1	—	—	—	3

Base: consumers who used hair styling products in the past four weeks.

Source: *Drug Store News*/Gallup 1992 Consumer Survey.

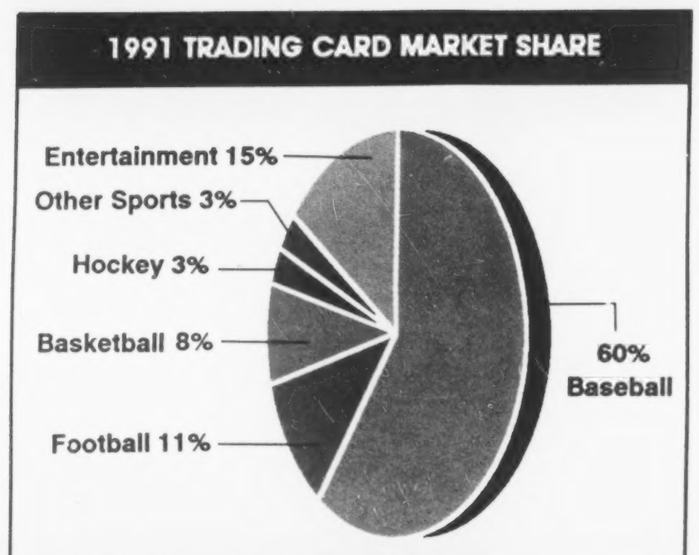
Where consumers "most often" buy hair styling products

Trade class	All users	All men	All women	Among consumers in these age groups: 18-24	25-34	35-49	50-64	65 Plus
Deep discount drug stores	24%	22%	25%	15%	22%	25%	30%	32%
Regular drug stores	12	14	12	14	12	3	13	30
Total all drug stores	37	36	37	29	34	28	43	62
Food stores	21	30	17	35	22	19	18	11
Beauty salons	13	12	14	10	15	17	12	6
Discount stores	13	9	14	12	10	16	13	12
Beauty supply stores	7	6	8	8	13	6	5	—
Department stores	4	4	4	4	3	8	4	—
Specialty cosmetic stores	2	1	3	—	2	5	1	2
Door-to-door	1	—	1	—	1	—	2	1

Base: consumers who used hair styling products in the past four weeks.

Source: *Drug Store News*/Gallup 1992 Consumer Survey.

Chains flip for trading cards



Manufacturers expect the robust growth and diversification within the trading card category to continue.

"We think there will always be a place for a company that can aggressively obtain licenses and effectively market their licenses," said George White, a spokesman for Skybox International, formerly Impel.

Timm Boyle, a spokesman for Topps, added another angle: "If you look at the incredible growth of the late 1980s, I think it is unrealistic to think that kind of incredible growth can continue throughout the 1990s. Merchandising will be the key to future growth."

Boyle recommends drug stores "concentrate on sports in season. Sports cards sell best prior to and at the start of their seasons."

To raise product visibility, manufacturers also recommend creating a collectible center stocked with a variety of cards and card collector supplies.

"Drug stores should treat cards and supplies as a package," said Jack Mayes, president of Cardboard Gold, a card supplies manufacturer, "because they bring in kids with their moms and dads who buy other products."

According to Mayes, the increasing value of cards has created a strong demand for card-related supplies that collectors can use to preserve their investments.

"Entertainment or non-sports cards accounted for more than half of the category's growth last year," said Skybox's White. But they generally have a shorter shelf than sports cards.

"There is just so much out there that it is confusing," said Walgreen assistant buyer Mark DeFilippo. "The whole industry has gotten away from kids to where now it is skewed toward adult collectors."

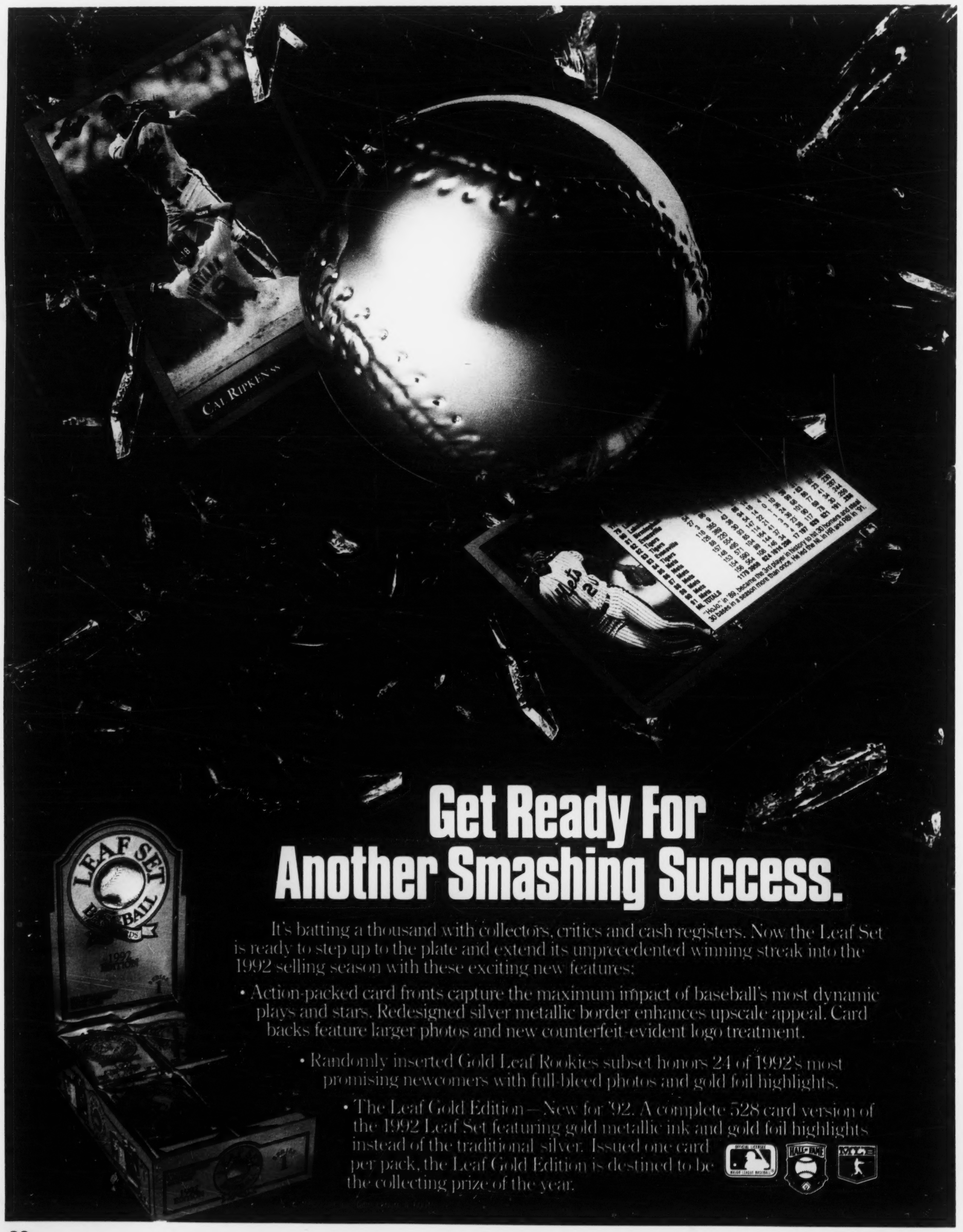
DeFilippo said most of the time he doesn't buy non-sports cards unless the card's theme is expected to be hot--such as the new Batman movie.

"There is no resale value with novelty or non-sports cards," DeFilippo said. "Kids are smart enough nowadays to know the value of a dollar, and they will spend their dollar for a pack of sports cards that might contain one card that will be worth $10 next week."

Walgreens store managers determine how to manage the category-- and usually give three to four feet on the bottom shelf in the candy section, DeFilippo said.

At Phar-Mor, more trading card activity may occur this fall, but "we really haven't done much because of theft concerns. We aren't real big into small ticket items like that," said buyer Bill Brock.

To avoid pack searching, a problem cited by Ed Ford, president of the National Association of Sportscard Dealers and Manufacturers, some stores put the pricier cards behind display cases. "People go through a pack and look for special cards, and render the entire pack unsellable," he said.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Drug Emporium restructures, sees upturn

By James Frederick

COLUMBUS, Ohio — Drug Emporium ceo Gary Wilber told a gathering of restive shareholders that the company had done the spadework for a return to profitability, perhaps as early as the second half of this year. But he warned that the chain continues to swim upriver against anemic consumer demand brought on by the sluggish economic recovery.

Weaker consumer spending, intense competition and adjustments in gross margins all combined to pull Drug Emporium into the red in the last fiscal year, with net losses of $4.7 million. The losses continued to stack up through the first three months of this year, with first-quarter losses totaling $710,000 and same-store sales down 2 percent.

At Drug Emporium's annual meeting here June 26, Wilber and other executives faced a roomful of stockholders—a few of whom expressed general dissatisfaction with the recent trends—and gave their most detailed explanation yet of the chain's response to the downturn. The company has centralized and consolidated its buying, marketing and accounting functions and restructured field management in a bid to alter the way it's done business since its inception in 1977.

Drug Emporium's new centralized buying and inventory control systems have improved in-stock levels and turns at this store in Columbus' Carriage Place shopping center.

The changes, Wilber said, are essential. "We have undergone a great deal of change in the last few months," he told shareholders. "We believe the historical formula for our success in the past is not effective in the increasingly competitive environment of today."

That formula relied on decentralized, local buying and merchandising by store managers and store department heads. The decentralization theme also played out in the chain's regional field structure, with operations formerly chopped up into 12 distinct regions, each with its own accounting and marketing department.

"What we discovered is we had about 400 people out there buying in the stores," said chain president Bob Lyons. He ticked off a list of priorities to get Drug Emporium back on sound financial footing, some of which have already been accomplished. Among them:

- Boost sales volume, and in particular boost turns. Drug Emporium's inventory turn-

See **Drug Emporium** *page 25*

Duane Reade makes its mark in a tough town

Duane Reade is slated to be sold to Boston-based Bain Capital, Inc., an investment firm with a history of adding retail operations, including Staples Inc. and Sports Authority Inc., to its portfolio.

Bain provided the economic boost some of its acquisitions needed to expand nationwide. It's brought half of its purchases to successful public offerings, something that may interest Duane Reade, since the chain's efforts to go public in 1984 were aborted. Bain Capital's ownership of consulting firm Bain & Co., known for its strategic planning prowess, adds to its attractiveness as an owner.

News Analysis

By Elizabeth Parks

NEW YORK — People who have never visited Duane Reade may wonder why Bain Capital would pay what some sources say is close to $300 million for the 38-store chain.

Duane Reade is not Walgreens or Eckerd. It would be hard to duplicate its operational formula on a national basis. It is not a chain for the suburbs or even for inner cities.

See **Duane Reade** *page 25*

Nielsen highlights 6
Snacks ring up crisp sales 14
Candy stays sweet for chains 16

Industry changes, alliances focus of jazzy NACDS show

By Barbara White

NEW ORLEANS — The NACDS Marketplace Conference wasn't business as usual for its 3,000 attendees.

The show's focus was on industry changes, and those changes were evident in every aspect of the show—from conversations on the show floor to opening remarks made by speakers.

True to the show's theme, "Alliances. . .Today's Reality," retailers and manufacturers alike said they have already formed solid partnerships to change the way they do business.

Many said they've come to realize that a joint effort to problem solving can shave time and money from costs buried in the pipeline.

While retailers were quick to praise the changes that good alliances have brought about, they're not so happy about the changes they fear might spring from Procter & Gamble's everyday low pricing strategy. The resentment raised by this strategy may serve to undercut the broader notion of partnerships.

In keeping with the show theme retailers and manufacturers said they have formed partnerships to change the way they do business.

Some retailers are still in the dark on the impact EDLP will have on their businesses. The hopeful are waiting until they see how programs translate to their everyday business practices.

Others aren't so kind. Traditional drug chains resent a strategy they feel will cost them their promotional edge.

While retailers didn't want to be quoted directly on the issue, their emotions run high.

Said one angry drug chain vp: "The way the strategy is being carried out is a concern to me. Indirectly, the retail price is set for you and I don't like that."

Retailers are convinced

See **NACDS** *page 21*

More NACDS pics on pg. 8 & 11